

2017 PERSONAL TAX ORGANIZER

Income Items

- 1099 Income | Statements (All)
- 401K Withdrawals
- Alimony
- Bonus | Commissions
- Cancellation of Debt Income
- Gambling - W2G
- Pension Plans
- Profit Sharing
- Social Security
- State Tax Refunds
- Unemployment Compensation
- Wages

Interest | Dividend Income (please list)

Savings | CD | Money Market

Stock Sales

Purchase price & selling price required

Health Insurance Information

Provide policy name, number & names of covered individuals

Taxes

- Real Estate
- State | Local Taxes
- Personal Property
- Other:

Interest Paid

- Home Mortgage
- Home Equity | Line of Credit
- HUD-1 Settlement Statement
(Purchase or Refinance)
- Deductible Points
- Investment Interest
- Student Loan Interest

Child Care Expenses

(**Must** have the following information)

Name: _____

Address: _____

Tax ID #: _____

Miscellaneous Items

Above 2% of AGI

- Tax Return Preparation Fees
- Safe Deposit Box
- College Tuition & Books

Retirement Accounts

Fee(s): _____

Contribution(s): _____

Employee Business Expense

- Uniforms
- Union Dues
- Professional Fees | Licenses
- Publications
- Required Supplies
- Tools
- Unreimbursed Mileage
- Job Search Expenses

Contributions

Church \$ _____

Charities \$ _____

Other than Cash _____

Volunteer Work Expenses \$ _____

Medical/Dental Expenses

Expenses must exceed 10% of Adjusted Gross Income

- Insurance Premiums
- Prescription Drugs
- Doctor | Dental
- Chiropractor
- Hospital
- Labs | Tests | X-Rays
- Therapy
- Transportation/Mileage

Job Related Moving Expenses
